



## 2. Previous fund details

a. Previous fund name

b. Fund telephone

c. Member or account number

d. Australian Business Number (ABN)

e. Unique Superannuation Identifier (USI)

f. Approximate account balance (optional)

g. Amount to be transferred (If you do not make a selection, your request will be treated as a whole balance transfer).

 Whole balance OR  Partial transfer of \$ 

## 3. Declaration and signature

a. Your Tax File Number (TFN)

To consolidate your super, we need your consent to disclose your TFN to your previous fund. If you have already provided your TFN, you give your consent when you sign this form. If you have not provided your TFN to give consent, write your TFN below and then sign the form. Please read the information about providing your TFN.

b. Declaration

By signing this request form, I am making the following statements:

- » I declare I have fully read this form and the information completed is true and correct.
- » I understand I may lose insurance cover and pay an exit fee in my previous fund.
- » I am aware I may ask my previous fund for information about any fees or charges that may apply, or any other information about the effect this transfer may have on my benefits, and do not require any further information.
- » I consent to my TFN being disclosed to my previous fund for the purposes of consolidating my super.
- » I discharge the superannuation provider of my previous fund of all further liability in respect of the benefits paid and transferred to the Russell Investments Master Trust.

Signature

Date (DD MM YYYY)

Member name

### Providing your Tax File Number (TFN)

Under the *Superannuation Industry (Supervision) Act 1993*, your superannuation fund is authorised to collect your TFN, which will only be used for lawful purposes.

These purposes may change in the future as a result of legislative change. The Trustee of your superannuation fund may disclose your TFN to another superannuation provider, when your benefits are being transferred, unless you request the Trustee of your superannuation fund in writing that your TFN not be disclosed to any other superannuation provider.

It is not an offence not to quote your TFN. However, giving your TFN to your superannuation fund will have the following advantages (which may not otherwise apply):

- » Your superannuation fund will be able to accept all types of contributions to your account(s);
- » Concessional contributions to your superannuation account(s) will be generally taxed at the concessional rate of 15%;

- » Other than the tax that may ordinarily apply, no additional tax will be deducted when you start drawing down your superannuation benefits; and
- » It will make it much easier to trace different superannuation accounts in your name so that you receive all your superannuation benefits when you retire.

Your TFN will otherwise remain confidential.

### » Please return this form to:

**iq Retirement by Russell Investments**  
Locked Bag A4094  
Sydney South NSW 1235

You can also contact us as follows:

Toll free on **1800 555 667**

Operating hours are from Monday to Friday, 9am – 5pm (AEST)

[iq@russellinvestments.com.au](mailto:iq@russellinvestments.com.au)

[russellinvestments.com.au/retirement](http://russellinvestments.com.au/retirement)